USDA Weekly Retail Turkey Feature Activity

Fri. Oct 14, 2011

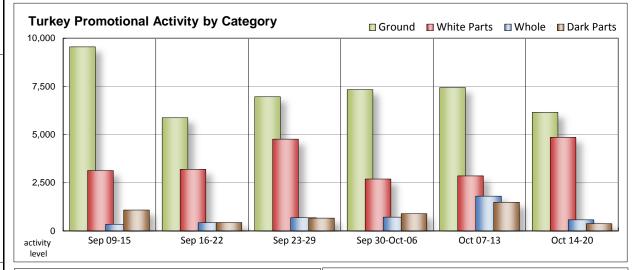
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/14 thru 10/20.

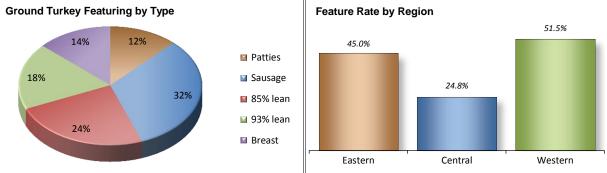
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh driffess otherwise noted												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST YEAR							
Feature Rate 1/	39.9%	of 19,500	37.1%	of 19,500	47.3% of 19,200 outlets 5.0%							
i cature ivate	ou	tlets	ou	tlets								
Special Rate 4/	10	.6%	0.	.4%								
Activity Index 2/	13	,080	15	,460	17,190							
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens					200	-						
" - Toms					10							
Frozen - Hens	130		900		1,280							
" - Toms	440	0.91	900	1.07	1,130	0.89						
PARTS:												
Breast:												
Bone-in, whole												
Fresh	80		320		10	-						
Frozen	1,190	1.82	850	1.74	1,440	1.65						
Split, bone-in												
Fresh			40									
Rotisserie	510		960		1,830							
Boneless, whole	620		70		290							
Cutlets	1,060		440	4.63	920							
Cutlets, thin sliced	570	3.99			10	4.99						
Strips												
Tenders	820	4.20	170	4.85	300	4.80						
Marinated Tenders	370	3.86	730	3.90	1,280	4.07						
Drumsticks	160	1.97	520	1.81	210	1.74						
Thighs	10	2.28	210	2.03	10	1.69						
Wings	150	2.02	520	1.81	280	1.69						
Necks	40	1.69	30	1.84	230	1.68						
Smoked Drumsticks			110	2.40	180	2.02						
Smoked Wings			40	2.22	190	2.01						
Smoked Necks	10	1.69	50	1.88								
GROUND TURKEY:	6,150	3.10	7,440	3.06	7,190	2.78						
Patties	750	3.25	740	3.19	610	3.01						
Sausage	1,980	3.25	1,650	2.96	2,180	2.63						
85% lean	1,480	2.35	1,250	2.28	1,060	2.16						
93% lean	1,120	3.00	2,890	2.98	2,410	2.59						
Breast	820 4.1		910	4.46	930	4.20						
Rolls (frsh/frz 1 lb.)	500	1.91	640	2.58	20	1.25						
Specialty 5/												
Patties	10		250		50							
93-94% lean	190		30		30							
Breast	70 5.52		240	5.46	10	5.99						

This Week's Turkey Feature Highlights

Retail activity slows. Fewer stores offer frozen whole turkeys; there are some prices sure to tempt shoppers this week. Stores are bringing out their purchase-based promotions for a free or reduced price Thanksgiving turkey. Offers slow on fresh bone-in breasts, increase on frozen. Rotisserie breasts are not as active and prices trend higher. Boneless white parts are heavily promoted, especially in the Eastern region; prices are lower. Offers increase on boneless whole breasts, cutlets, thin sliced cutlets and tenders; slow on marinated tenders. Not as many stores are showing dark parts. Ground turkey is less active; the weighted average price is higher. Retailers lose interest in 93% lean and feature more sausage and 85% lean. Deli items are heavily promoted. Service deli Category 1 is the most active; offers increase on both processor and private brands. Fewer stores feature Category 2. Self-service deli is heavily promoted with all items getting more ad space.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

Note: rolls & specialty not included in ground turkey total and weighted average.

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/14 thru 10/20.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	EAST	ERN U.S.			CEN	TRAL U.S.		WES	WESTERN U.S.				
	(CT,DC,DE,F	L,GA,MA,MD,ME	,	(,	AL,AR,IA,IL,	IN,KS,KY,LA,MI	,MN,	(AZ,C	CA,CO,ID,MT,				
	MO,	MS,ND,NE,	OH, OK,SD,TN,	,TX,WI)	NM,NV,	NM,NV,OR,UT,WA,WY)							
Feature Rate 1/		PA,RI,SC,VA,VT,V 0 sampled outle	•			00 sampled out	,	51.5% of 4,700 sampled outlets 23.0% of stores w/ no-price promotions Activity Index = 1,790					
Special Rate 4/	2.2% of stores w	•			•	w/ no-price pro							
Activity Index 2/		Index = 9,260		12.47		Index = 1,760	motions						
riotivity illuox	Price Range	Summar	'V	Price	Range	Summ	narv	Price Range Summary					
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Stores Wtd Avg		(\$/pound)	Stores Wtd Avg				
WHOLE BIRDS:	,			(*)	,			,		<u> </u>			
Fresh - Hens													
" - Toms													
Frozen - Hens				0.59 -	1.49	130	0.62						
" - Toms	0.79	200	0.79	0.59 -	1.49	240	1.01						
PARTS:													
Breast:													
Bone-in, whole													
Fresh								2.49 - 3.99	80	2.59			
Frozen	1.49 - 2.29	770	1.96	0.99	- 1.99	360	1.54	1.69 - 1.99	60	1.78			
Split, bone-in													
Fresh													
Rotisserie	5.99 - 7.99	290	7.14		9.99	190	9.99	8.99	30	8.99			
Boneless, whole	3.99	570	3.99	3.83	- 3.99	50	3.86						
Cutlets	3.99 - 5.45	960	4.36	3.99	- 4.29	90	4.21	5.45	10	5.45			
Cutlets, thin sliced	3.99	570	3.99										
Strips													
Tenders	3.99 - 5.99	770	4.22		3.99	20	3.99	3.49 - 4.79	30	3.78			
Marinated Tenders	3.73 - 4.26	320	3.94					3.33	50	3.33			
Drumsticks	1.49 - 2.39	160	1.97										
Thighs					2.28	10	2.28						
Wings	1.49 - 2.39	150	2.02										
Necks	1.69	40	1.69										
Smoked Drumsticks													
Smoked Wings													
Smoked Necks					1.69	10	1.69						
GROUND TURKEY:													
Patties	2.99 - 3.49	680	3.27	2.50	- 3.38	60	3.02	3.29	10	3.29			
Sausage	2.39 - 3.59	1,380	3.11	2.87	- 2.98	40	2.94	2.46 - 3.99	560	3.59			
85% lean	1.99 - 3.00	1,080	2.46	2.00	- 2.40	190	2.11	1.99 - 2.00	210	1.99			
93% lean	2.45 - 3.30	680	3.04	2.80	- 3.20	50	3.02	2.39 - 3.59	390	2.94			
Breast (99-100% lean)	3.84 - 4.99	640	4.04					3.99 - 5.43	180	4.42			
Rolls (frsh/frz 1 lb.)				1.00	- 2.16	320	1.69	1.68 - 2.50	180	2.30			
Specialty ^{5/}													
Patties					4.49	10	4.49						
93-94% lean	3.99 - 5.49	160	4.05		4.49	10	4.49	3.79 - 3.99	20	3.88			
Breast	5.00 - 5.99	40	5.50	ĺ	5.49	20	5.49	5.69	10	5.69			



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Oct 14, 2011

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/14 thru 10/20.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	NATIONAL SUMMARY			RY	EASTERN U.S.			CEN ⁻	WESTERN U.S.					
	This	Week	Last \	Neek	(CT,DC,DE,FL,GA,MA,MD,ME,			(AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,			(AZ,CA,CO,ID,MT,			
1/	88.9% o	f 19,500	71.1% of	19,500	NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)			MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)			NM,NV,OR,UT,WA,WY)			
Feature Rate 1/	sto	res	sto	res	91.4% of 8,400 sampled outlets			92.0% of 6,40	80.1% of 4,700 sampled outlets					
Antivity Index 2/	57	040	40.7	700	Activity Index = 31,910		Activity Index = 16,330			Activity Index = 9,600				
Activity Index 2/ 57,840		040	42,780		Price Range Summary		mary	Price Range Summary			Price Range Summary			
	Stores	Wtd Avg	Stores Wtd Avg		(\$/pound)	Stores	Wtd Avg	(\$/pound)	(\$/pound) Stores Wtd Avg		(\$/pou	ınd)	Stores Wtd Avg	
SERVICE DELI - Turkey														
Category 1														
Processor Brand	- ,	7.92	4,860	8.12	5.49 - 9.79	4,280	8.03	5.99 - 9.99	1,420	7.36	6.98 -	11.49	970	8.23
Private Brand	2,660	7.18	2,190	7.72	6.99 - 8.99	2,290	7.18	6.59 - 8.99	370	7.16				
Category 2 Processor Brand	5,440	5.95	6,250	6.12	4.99 - 6.99	2,910	6.19	4.58 - 6.99	1,950	5.54	5.19 -	C 40	580	6.17
Private Brand	2,690	6.34	2,920	6.89	4.99 - 6.99 5.98 - 6.99	1,670	6.31	4.99 - 6.99	1,950	6.39	5.19 -	6.49	560	0.17
Category 3	2,090	0.54	2,920	0.09	3.96 - 0.99	1,070	0.51	4.99 - 0.99	1,020	0.59				
Processor Brand	990	4.07	1,000	3.76	2.97 - 4.98	480	4.03	2.99 - 4.99	320	3.98	2.99 -	4.99	190	4.32
Private Brand		5.14	1,510	5.09	3.98 - 4.99	1,130	4.96	4.99	200	4.99		5.99	290	5.99
Turkey Ham	,,,,,		1,010			1,100								
Processor Brand	300	3.00	480	3.25	1.98 - 3.99	80	3.80	2.49 - 3.98	150	2.65	2.19 -	2.99	70	2.85
Private Brand	50	3.84			3.49 - 3.98	50	3.84							
Turkey Pastrami														
Processor Brand	280	3.82	190	3.71	2.98 - 3.99	140	3.73	2.99 - 4.49	140	3.91				
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	3,750	7.07	3,450	7.67	5.49 - 9.49	2,320	7.45	5.69 - 7.99	880	6.43	5.69 -	9.99	550	6.50
Private Brand	1,340	7.14	1,460	7.23	6.99 - 7.99	1,290	7.16	7.49	20	7.49		5.99	30	5.99
Category 2														
Processor Brand	810	6.28	730	6.18	5.99 - 6.99	190	6.96	3.69 - 6.99	620	6.07				
Private Brand	190	5.98	240	6.99				5.98	190	5.98				
SELF-SERVICE DELI														
(dollars per tub or pouch) Turkey 7-10 oz														
Processor Brand	12,040	3.22	6,860	3.28	2.49 - 3.99	5,760	3.33	1.99 - 4.00	4,160	3.04	1.99 -	3.99	2,120	3.28
Private Brand	,	2.93	2,500	2.88	2.39 - 3.49	1,920	2.66	2.39 - 3.69	540	3.10	2.99 -		1,370	3.23
Turkey 16 oz	0,000	2.00	2,000	2.00	2.00 0.40	1,020	2.00	2.00 0.00	040	0.10	2.00	7.20	1,070	0.20
Processor Brand	420	5.84	200	5.42	5.99 - 6.99	270	6.14	4.00 - 5.99	150	5.29				
Private Brand														
Chicken 7-10 oz														
Processor Brand	-,	3.22	5,440	3.33	2.39 - 3.99	5,210	3.31	1.99 - 4.00	3,660	3.04	2.48 -	3.99	2,060	3.30
Private Brand	3,830	2.93	2,500	2.88	2.39 - 3.49	1,920	2.66	2.39 - 3.69	540	3.10	2.99 -	4.29	1,370	3.23

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)